

## **LBNL – PROCUREMENT STANDARD PRACTICES**

**Section: 11 Describing University of California Needs**

**Subject: 11.1 Specifications and Standards -- General**

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<b>PURPOSE:</b>	This standard practice (SP) describes how goods and services are specified.
<b>POLICY:</b>	Goods and services should be purchased through the use of specifications, standards, and descriptions which clearly and accurately describe the goods and services to be purchased and which avoid unnecessarily restrictive specifications or requirements.
<b>SCOPE:</b>	This SP applies to subcontracts exceeding the small purchase threshold or when otherwise appropriate.
<b>DEFINITIONS:</b>	
<b>Brand Name Description</b>	A brand name description is a purchase description that identifies a product by its brand name and model or part number or other appropriate nomenclature by which the product is offered for sale.
<b>Specification</b>	A specification is a description of the technical requirements for a material, product, or service that includes the criteria for determining whether these requirements are met.
<b>Standard</b>	A standard is a document that establishes engineering and technical limitations and applications of items, materials, processes, methods, designs, and engineering practices. Standards may be used in specifications, solicitations, and subcontracts.
<b>Voluntary Standard</b>	A voluntary standard is a standard established by a private sector body and available for public use.

### **PROCEDURES:**

<b>Purchase Requests</b>	<p>Purchase requests should contain, or be accompanied by, all information necessary to accomplish the subcontract, including:</p> <ul style="list-style-type: none"><li>• Complete descriptions of the supplies or services required;</li><li>• Technical specifications;</li><li>• Any special considerations to be given; and/or</li><li>• Exceptional conditions to be met.</li></ul> <p>Requesters are expected to specify the requirements completely enough, using accepted industry design, performance, or other definitive terms, to ensure that there is a reasonable basis for securing proposals, for a sound subcontract, and for determining the acceptability of the goods or services.</p>
<b>Purchase Descriptions</b>	<p>Purchase descriptions should:</p> <ul style="list-style-type: none"><li>• State the Laboratory's minimum requirements;</li></ul>

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- Describe the supplies or services in a manner designed to promote competition; and
- To the fullest extent practicable, not favor one brand or trade name article, manufacturer, or supplier over others.

### **Standards**

Standards should be adopted as a major contribution to cost reduction. Federal specifications and standards and voluntary standards should be used where practicable as guides for such subcontracts.

### **Brand Names**

If detailed specifications or descriptions are not available and it is impractical or uneconomical to prepare them, the use of "brand name or equal" descriptions may be appropriate. The clause in Exhibit 11.1.a, Brand Name or Equal Clause, should be included in competitive solicitations involving brand name or equal descriptions.

## **RESPONSIBILITIES:**

### **Procurement Specialist**

The procurement specialist will ensure that:

- Purchase descriptions fully describe the requirements in a manner that, to the extent practicable, does not favor one brand or subcontractor over another and
- Specifications and standards are used when economical or practicable.

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**Exhibit: 11.1.a Brand Name or Equal Clause**

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The following clause should be included in solicitations specifying "brand name or equal":

### **BRAND NAME OR EQUAL**

If items called for by this solicitation have been identified as a "brand name or equal" description, such identification is intended to be descriptive, but not restrictive, and is to indicate the quality and characteristics of products that will satisfy the University's requirements. Offer of equivalent items will be considered for award if (1) such items are clearly identified by manufacturer's name, brand, and model number, if any, in the offer; (2) descriptive literature or other such data is provided to show that the equivalent items are equal to the brand name; and (3) the University determines such items to be equal in all material respects to the salient specifications of the products required.

Offeror shall clearly indicate that it is offering an "equal" product unless the Offeror is offering the brand name product(s) referenced in the inquiry.

The evaluation of offers and the determination as to equality of the product proposed should be the responsibility of the University and will be based on information provided in the offer and/or information reasonably available to the University.